Preparing the Performance Evaluation

# Reviewing the past - look at previous evaluations.

What were the issues then? Has the employee made progress?

What were the previously established goals?

Did the employee meet the goals?

# Review any data or critical incident information.

Relevant data or statistics, key activity reports, notes from past meetings, record of development efforts (training, workshops and professional conferences, fee waiver), etc.

# Get other perspectives (if appropriate).

Solicit comments from others with whom the employee must interact. Ask their opinions regarding the employee’s strengths and what changes could be made to make the employee more effective.

# Review the employee’s self-evaluation.

Allows the employee to give his/her perspective.

Gives you an idea of what the employee views as critical to the job-is it consistent with the supervisor’s expectations?

Takes burden off supervisor to remember everything.

If the employee is having difficulty completing the self-evaluation, the supervisor may suggest that the employee assess the following:

* What critical activities/results were expected of you and how successful were you in completing those tasks. What would not have gotten done if you had not been here?
* What major contributions did you make during the past evaluation period? (Examples: handled a particularly tough assignment, solved a crucial problem, successfully implemented a new idea, made significant improvements in work processes).
* What progress have you made on previously identified improvement areas?
* What development efforts have you engaged in?
* Were there any obstacles to meeting your goals?

# Review the Position Description Form and established performance standards.

# Outline/organize the evaluation.

# Write/edit the evaluation.

Do writing in quiet, private setting.

Address each critical function and support with specific examples.

Cite areas that need improvement.

Establish preliminary goals for the next review period.

# Check for bias, word choice, etc.

# Set the stage for the evaluation meeting.

# Conduct evaluation meeting.